

Case Name: _____ Case Number: ____-CV-_____(____) (TAM)

CASE MANAGEMENT WORKSHEETPreparation for Initial Conference

Rule 26(f) conference held?	Date:		
Deadline for Rule 26(a) initial disclosures and any HIPAA-compliant records authorizations:			
Procedures discussed for producing Electronically Stored Information (ESI)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	N/A
Confidentiality Order to be submitted for Court approval?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	N/A
Anticipated number of depositions:	Plaintiff(s): Defendant(s):		
First requests for production of documents and for interrogatories due by:			

Proposed Deadlines for Pre-Settlement Discovery (Phase I)

Agreed upon completion date for Phase I Discovery: (Reciprocal agreed upon document production and other discovery necessary for a reasoned consideration of settlement. Presumptively 60 days after Initial Conference.)	
Date for pre-settlement status conference with counsel: (Proposed date to report the parties' preparedness for mediation or a settlement conference. Presumptively 10-15 days after the completion of Phase I Discovery.)	

Proposed Deadlines for Discovery and Motion Practice (Phase II)

Deadline to join new parties or amend pleadings as of right: (Presumptively 15 days after initial settlement conference)	
All fact discovery completed by: (Presumptively 3.5 months after first requests for documents/interrogatories)	
Joint status report certifying close of fact discovery:	
Anticipated number of expert reports:	Plaintiff(s): Defendant(s):

Exchange of expert disclosures completed by: (Presumptively 30 days after fact discovery)		
Expert depositions completed by: (Presumptively 30 days after initial expert disclosures)		
Exchange of rebuttal expert reports by: (Presumptively 30–45 days after initial expert disclosures)		
All expert discovery completed by:		
CERTIFICATION OF THE COMPLETION OF ALL DISCOVERY BY: (Presumptively 9 months after Initial Conference)		
Final date to take first step in dispositive motion practice: (Parties are directed to consult the District Judge’s Individual Rules regarding such motion practice. Presumptively 30 days after completion of all discovery.)		
Do the parties wish to be referred to EDNY’s mediation program pursuant to Local Rule 83.8?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do the parties consent to trial before a Magistrate Judge pursuant to 28 U.S.C. § 636(c)? (The fillable consent form may be found at https://www.uscourts.gov/forms/civil-forms/notice-consent-and-reference-civil-action-magistrate-judge . Consenting does not affect a party’s right to a jury trial.)	Yes <input type="checkbox"/>	No <input type="checkbox"/>

SO ORDERED:

TARYN A. MERKL
United States Magistrate Judge

DATE